

Enhancing the Tax Pro Experience 2.0:
IRS Resources and "How-tos" for
You, Your Clients and Practice



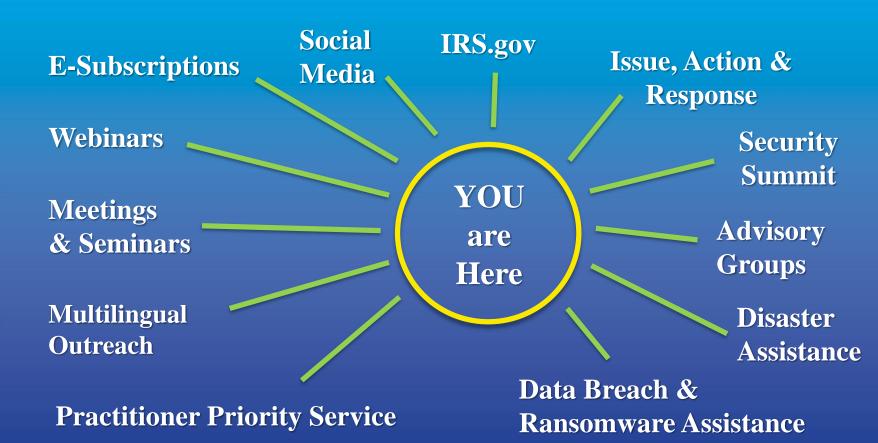
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# Objectives

- View & share IRS Communications timely
- Attend IRS Training & Meetings
- Be informed about other significant programs & resources
- Interact for answers & guidance; provide feedback & ideas
- Report systemic issues & concerns



### Your Connection with IRS Information





### Connect with the IRS

The IRS uses social media tools to share the latest information on tax changes, scam alerts, initiatives, products and services. Connect with the IRS through the following social media tools.

### IRS2Go

Get quick access to IRS social media, sign up for helpful tax tips, check your tax refund status and make a payment — all with the <a href="IRS2Go mobile app">IRS2Go mobile app</a>. IRS2Go is available in both English and Spanish for Android and iOS mobile devices.

### YouTube



Tune in to the IRS YouTube channels. You can watch short, informative videos in English, American Sign Language and Spanish.

### Twitter



IRS tweets include various announcements, scam alert and news for tax professionals. Available in English and Spanish.

### Facebook

The IRS Facebook pages post useful information for general public in English and Spanish tax professionals.

### LinkedIn

The IRS Linkedin page posts important tax information, updates, and announcements from the IRS.

### Instagram

The IRS Instagram account will share taxpayer-friendly information on a variety of topics to help people Get Ready for the tax season and to navigate tax law changes. It will also provide the latest tax scam information to help support the Security Summit initiative to combat tax-related identity theft, as well as periodically share information in Spanish and other languages.

### IRS2Go

IRS2GoApp

### YouTube

- IRS Videos
- IRS Videos ASL
- IRS Videos Multilingual
- Taxpayer Advocate

### Twitter

- @IRSnews
- @IRStaxpros
- @IRSenESpanol
- @RecruitmentIRS
- @YourVoiceAtIRS
- @IRStaxsecurity
- @IRSsmaWbiz

### Facebook

- IRS
- IRS en Español
- IRS Tax Pros
- Taxpayer Advocate

### LinkedIn

LinkedIn

### Instagram

@IRSnews

Other Twitter accounts

NEW
Follow us
on
Instagram

### IRS.gov – Keyword: social media

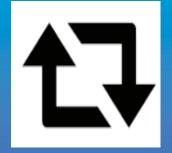


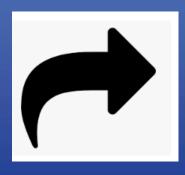
# 2019

### Social Media ~ How to Share











### Social Media ~ Twitter



IRS @IRSnews · May 5

#TaxSecurity alert: New spoof on #IRS phone scam, pretending to be the Taxpayer Advocate Service requesting personal information like SSN & ITINs. go.usa.gov/xEFWS



IRS @IRSnews · 2h

Having too little tax withheld can mean an unexpected #IRS bill or a penalty at tax time in 2020. Do a #PaycheckCheckup now. irs.gov/withholding





Follow us... https://twitter.com/IRSnews



### Twitter – How to Retweet

### Hover over Tweet to share:

- Click **Retweet** button
- Select Retweet or Retweet with comment
- Retweeting no further action required
- Adding comment type message in pop up screen
- Click **Retweet** button in upper right hand corner









### Twitter – Share via Email

- Click <sup>✓</sup> icon located within Tweet
- From pop-up menu, select Copy link to Tweet.
- URL will be copied to your clipboard
- Open your email client, paste URL into email you compose







## Twitter – Share via Other Media

- Use Share icon at bottom of message.
- Select which media to use for sharing.







**IRStaxsecurity** (@IRStaxsecurity) tweeted at 6:05 PM on Sun, Mar 24, 2019: #TaxSecurity alert: New "spoof" on #IRS phone scam, pretending to be the Taxpayer Advocate Service requesting personal information like SSN & ITINs.

https://t.co/bPqTg11GuM https://t.co/IGGI7spTA0 (https://twitter.com/IRStaxsec urity/status/11099845102617 72291?s=09)

## Twitter @IRSenEspanol



IRS en Espanol @IRSenEspanol . 20h

#IRS advierte a los contribuyentes sobre las estafas tributarias en curso. Manténgase alerta: irs.gov/docenasucia





Una advertencia a tiempo ayuda a proteger a sus seres queridos de no caer en estafas tributarias.

Corra la voz:

www.irs.gov/alertas



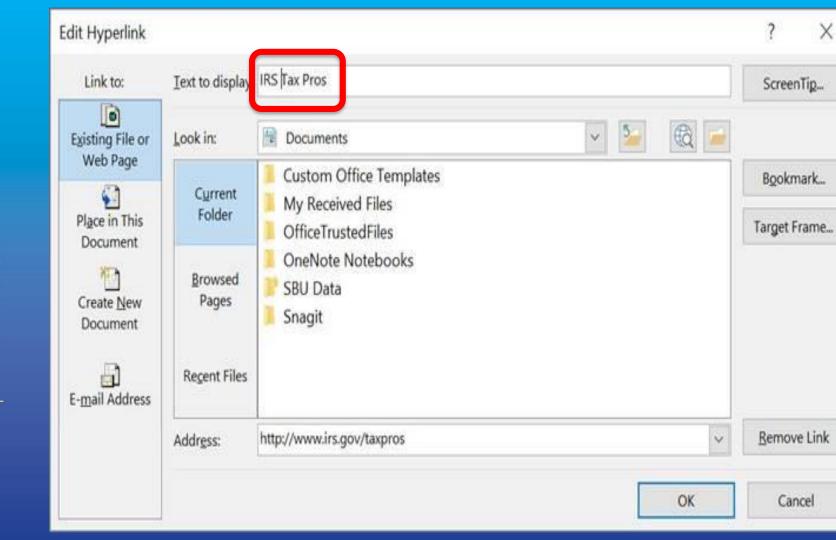
Siganos... https://twitter.com/IRSenEspanol

### Social Media ~ YouTube





Q



X

ScreenTip...

Bookmark...

Remove Link

Cancel

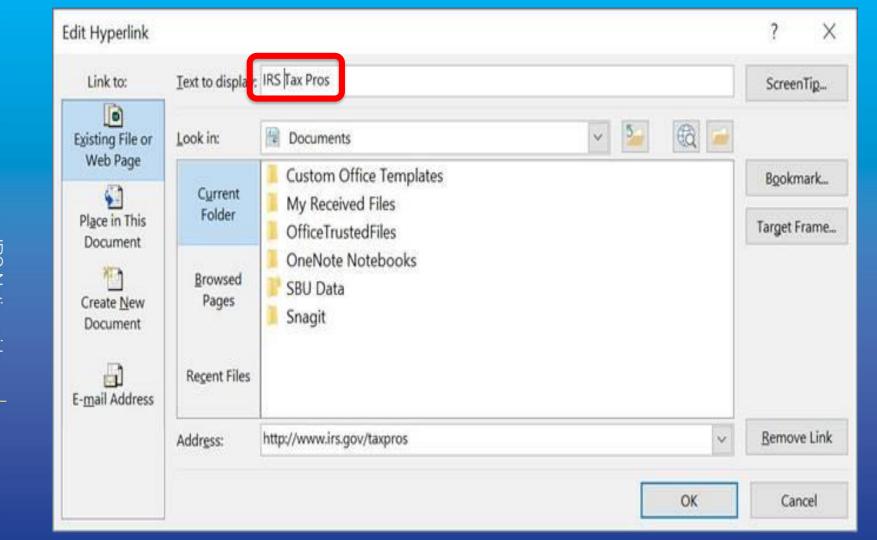
### Social Media ~ YouTube



# 200

### Share/Embed YouTube Video





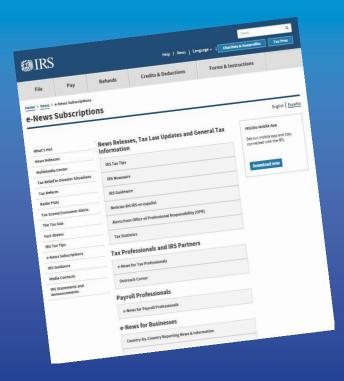


# Social Media ~ Instagram



Search: *Instagram.com/irsnews/* 

# We Heard You e-Subscriptions Tailored to Suit Your Needs

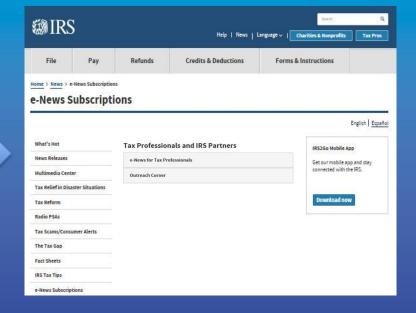


Following the 2018 IRSAC Report and your comments at last year's Tax Forums, subscribing to IRS e-Subscriptions just got better.

- It's easier to subscribe
- Fewer subscriptions to manage
- Updated descriptions so it's easier to find content relevant to your needs
- Improved content tailored by topic

# Streamlined News for Tax Professionals & IRS Partners

₩IRS	1		Help   News	Language	rities & Nonprofits	Q. Tax Pros	
File	Pay	Refunds	Credits & Deductions	Forms & In	structions		
e-News S	me offic				Eng	lish   Español	
					-		
What's Hot		Tax Professionals, IRS Partners, & Software  Developers			IRS2Go Mobile App		
News Releases		e-News for Tax Professionals - Provides the latest national news for the tax			Get our mobile app and stay connected with the IPS.		
Multimedia Cente	er :	professional community, as well as links to resources on IRS.gov and local news and events by state.			connected with the IKS.		
Tax Relief in Disas	ster Situations		ss Service (IVES) Program e-News and Upd				
Tax Reform		important program updates, system maintenance schedules, and other helpful informations to industry professionals and the IVES community.  Downstoad Cutner – An other center that equips organizations, employers, and other swift control products exist. For use in their swift communications whiches					
Radio PSAs							
Tax Scams/Consu	mer Alerts						
The Tax Gap		approved continuing edu	Education Providers - Designed to provide cation providers with the latest news and u				
Fact Sheets		well as links to resources					
IRS Tax Tips		Modernized e-File (MeF) News for Partnerships - Receive Information on current developments and updates to the e-filing guidance, known issues, and the latest information of interest to MeF participants.					
e-News Subscript	ions		to the minute e-file information, designed				
IRS Guidance			ware providers informed of e-file issues an				
Media Contacts		Alerts – For tax return preparers. Provides information regarding processing delays, programming issues, changes to any filling season procedure, Error Code and Rusiness Quie information					
IRS Statements a Announcements	nd	General Notifications	For tax return preparers. Provides information ferences, e-file publication changes.	stion			
		IRS e-file program upd	ce Center Messages – For tax return prepar ates, General information, Service Center r alp Desk phone numbers and more.				
		Quick Alerts - Technica Software testing (PATS	l – For tax software providers. Schema info and ATS).	ormation,			
		specifications and syst	le Care Act Information Return (AIR) – Elect em information needed for software devel suffissuers to transmit the information return, and 1095-C to IRS.	opers,			



We eliminated 8 subscriptions to offer Tax Professionals & IRS Partners 2 streamlined sources to access the information you need.



### Subscribe to IRS e-News for Tax Pros



e-News for Tax Professionals

May 31, 2019

### Useful Links:

IRS.gov

Tax Professionals Home

All Forms and Instructions

Stakeholders Partners' Headliners

### Inside This Issue

Issue Number: 2019-18

- IRS Unveils Proposed W-4 Design for 2020
- 2. Early Bird Rate for Nationwide Tax Forums Expires June 15
- 3. June 6 Webinar: Foreign Earned Income Exclusion
- 4. Enrolled Agent User Fee Increases Nov. 1
- 5. Reminder: Recent Changes to Business Deductions and Expenses

### **Simply Click:**

- 1. News
- 2. e-News
  Subscriptions
- 3. e-News for Tax Pros
- 4. ...and Subscribe

IRS.gov – Keyword: *e-News* 



# Send Important Information to Your Clients Click: Share



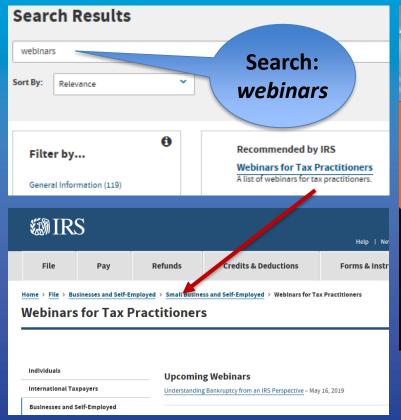
...IRS e-Subscription

# 2019

# IRS Tax Tips

<b>MIR</b>	S			Search	Q			
			Keyword:	age Y   Charities & Nonprofits	Tax Pros			
File	Pay	Refunds	Credits & Dedu Current tax tips					
Home > News > II	RS Tax Tips > ID ti	heft: Here's what to look f	or and what to do when it happens					
ID theft: I	Here's wl	hat to look f	or and what to do when it happens					
					English   Español			
What's Hot		IRS Tax Tip 20	19-40, April 11, 2019					
		Tax-related identity theft occurs when a thief uses someone's stolen Social Security number to file a tax return and claim a fraudulent refuse e victim may be unaware that this has happened until they e-file their return. Even before the victim files their return, the IRS may send the taxpy terms.						
News Releases		saying the agency identified a suspicious return using the stolen SSN.						
Multimedia Cent	er .	Here are some	things people should know about identity theft, including warning signs and step	s to take after ider Eng	lish			
	•			ar				
			on IRS.gov	Spai				

### IRS Webinars for Tax Professionals





IRS.gov – Keyword: webinars

### IRS Video Portal



earch

Individuals

Businesses

Tax Professionals

Governments

Charities & Non-Profits

Español

### Tax Reform for You

### Tax Reform Basics for the Qualified Business Income Deduction (199A)

This webinar highlights various limitations, exclusions and thresholds related to eligibility for the qualified business income deduction (199A), various calculations and the basics for tax reporting. This 20% deduction applies to non-C corporations, is in addition to the standard deduction or itemized deductions and is reported on Form 1040.

### Tax Reform Basics for Employers

This webinar highlights changes impacting employers; including the employer credit for paid family and medical leave, employee achievement awards, qualified transportation fringe benefits and other provisions impacting employers.

### Tax Reform Basics for Small Businesses and Pass-Through Entities

This webinar highlights changes, including section 179 expensing, bonus depreciation, like-kind exchanges, and extending the time limit for filing an administrative claim and for bringing a suit for wrongful levy. This webinar also provides an overview of the deduction for qualified business income, section 199A.

### Tax Reform Basics for Individuals and Families

This webinar highlights changes to standard deductions, personal exemptions, itemized deductions, child tax credit and other changes.

### Tax Reform Due Diligence Requirements

This webinar gives tax professionals updates and guidance on how the TCJA provisions will affect their due diligence requirements. It also addresses common errors, how to avoid them and applicable penalties if requirements are not met.

### Understanding Tax Reform Basics about Opportunity Zones

This webinar defines what is a Qualified Opportunity Zone, discusses the tax benefits of investing in a Qualified Opportunity Fund, and covers the requirements of becoming an Opportunity Fund.

### Understanding How to Use the IRS Withholding Calculator to Check & Correct Withholding

This webinar illustrates why some major segments of the population need to change their withholding soon and familiarizes tax professionals with how to use the IRS withholding calculator to help taxpayers change their withholding.

### www.irsvideos.gov

# Working Together



## Multilingual Outreach

• IRS.gov – 5 languages

HELLO

CIAO

您好

- Over the Phone Interpreter
- Webinars offered in Spanish



Language 🕆

English

Español

中文

한국어

Русский

Tiếng Việt



# Practitioner Priority Service

Your first point of contact for account related issues – with third party authorization

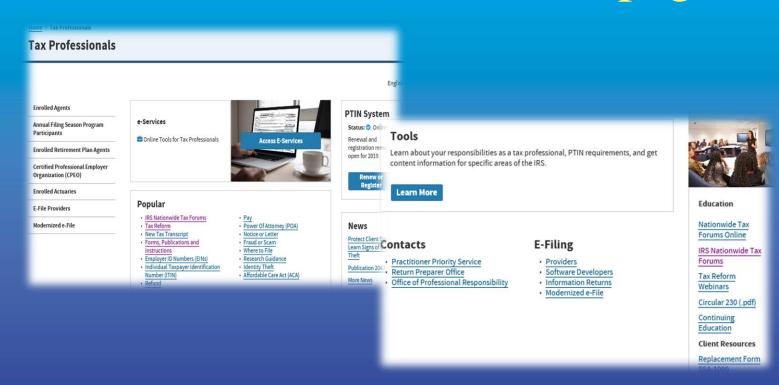
(866) 860- 4259

### PPS service hours are weekdays:

- 7 a.m. to 7 p.m. local time (Alaska and Hawaii follow Pacific time)
- 8 a.m. to 8 p.m. local time for Puerto Rico

IRS.gov – Keyword: *PPS* 

## Tax Professionals Webpage



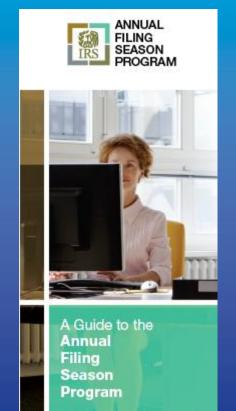
IRS.gov - click on Tax Pros

button



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# Enrolled Agent & Annual Filing Season Programs



Your Pathway to Becoming an Enrolled Agent Starts Here

IRS.gov – Keywords:

Enrolled Agent

Annual Filing Season



## More Tax Pro pages on IRS.gov

### isaster Relief Resource Center for Tax Professionals

**Enrolled Agents** 

Annual Filing Season Program **Participants** 

**Enrolled Retirement Plan Agents** 

Certified Professional Employer Organization (CPEO)

**Enrolled Actuaries** 

E-File Providers Modernized e-File Welcome to the IRS Disaster Relief Resource Center for Tax Professionals.

Disasters can mean that many payroll and practitioner businesses and their clients suffer significant losses. Our goal is to provide resources and help to the affected payroll and practitioner community.

This resource center addresses common questions from tax professionals.

For news releases and other announcements on recent disasters, see Tax Relief in Disaster Situations. Disaster relief applies to tax preparers who are unable to file returns or make payments on behalf of the client because of the disaster. Taxpayers outside of the disaster area may qualify for relief if:

- their preparer is in the disaster area, and
- · the preparer is unable to file or pay on their behalf.

### Disaster Assistance Information

- · FAOs for Disaster Victims
- Get Transcript Copies or transcripts of filed and processed tax returns can help reconstruct tax
- · Bulk Requests from Practitioners for Disaster Relief Guidance on procedures for practitioners in
- to self-identify their clients for disaster relief. · Disaster Assistance and Emergency Relief for Individuals and Businesses

Keyword: *Disaster* Relief Resource

### Keyword: Data Breach for Tax Professionals

Home > File > Individuals > Data Theft Information for Tax Professionals

### **Data Theft Information for Tax Professionals**

All tax professionals should be aware that they, too, are targets of cybercriminals seeki Individuals fraudulent tax returns for refunds. Are you prepared? Protect your clients and protect y

> The IRS recommends tax professionals use Publication 4557, Safeguarding Taxpayer D of your current security measures and to create or update your security plan. It is critic precautions and address any weaknesses.

> The IRS also recommends tax professionals create an action plan to outline the steps y theft. This will save valuable time should the worst occur.

The "Protect Your Clients; Protect Yourself" campaign to raise awareness among tax pr Security Summit, a joint project by the IRS, states and the tax community to combat ic client data held by tax professionals, cybercriminals increasingly are targeting the tax professionals must take appropriate steps to protect their clients' data and protect the

IMPORTANT: Always use robust security software for all computers and devices, and re identify any malware/virus infections. Use strong password to access computers and cl phishing email schemes.

Should you experience a data compromise - whether by cybercriminals, theft or accide should take. For a comprehensive list of security actions, consult a security profession.

Seniors & Retirees

How to File

When to File

Where to File

Students

Employees

Parents

Military

Your Information



# First Steps in Reporting a Data Breach or Ransomware Attack

- Contact your local Stakeholder Liaison (SL) quickly; provide details and information promptly
- Follow the guidance from your SL, Pub 5293, Pub 5447 and the IRS Data Breach webpage
- Take proactive steps to discover the cause of the attack
- Notify local and other federal agencies depending on type of attack

### Data Theft Information for Tax Pros



### Protect Your Clients; Protect Yourself Data Security Resource Guide for Tax Professionals



The Data Security Resource Guide for Tax Professionals is intended to provide a basic understanding of minimal steps to protect client data. All tax professionals are encouraged to work with cybersecurity professionals to ensure secure systems. Protecting taxpayer data from theft and disclosure is your responsibility.

### **Get Started**

The Security Summit – the partnership between the Internal Revenue Service, state tax agencies and the tax industry – reminds all tax professionals that everyone has a role in protecting taxpayer data.

The Financial Services Modernization Act of 1999, also known as Gramm-Leach-Billey Act, requires certain entities – including tax return preparers – to create and maintain a security plan for the protection of client data.

Here are two publications to help you get started:

IRS Publication 4557, Safeguarding Taxpayer Data
This publication provides an overview of tax professionals' obligations to protect axpayer
information and provides a step-by-step checklist for how to create and maintain a
security plan for your digital network and office.

## Pub 5293

NIST's Small Business Information Security – The Fundamentals The National Institute of Standards and Technology (NIST) is a branch of the U.S. Commerce Department, it sets the information security framework for federal agencies. It also produced this document to provide small businesses with an overview of those steps to security data. Its focus is on five principles: identify, protect, detect, respond and recovery.

Don't forget Publication 1345, Handbook for Authorized IRS e-File Providers, which outlines your responsibility as an Electronic Return Originator, including in the area of e-File security and privacy.

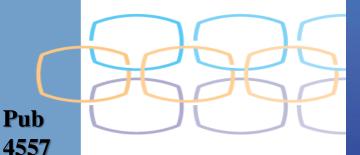


What Can You Do?



# Safeguarding Taxpayer Data

A GUIDE FOR YOUR BUSINESS



### Disasters





### Disaster Assistance

- Relief Provisions
- Tax Relief Information
- Resource Center

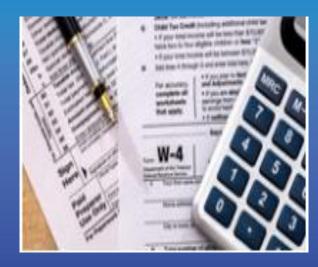


IRS.gov – Keyword: disaster relief



## IRS Withholding Estimator

		Tax	Withholdi	ng Estimat	or		
		Use your best estimates for the year ahead to determine how to complete Form 161-4 so you don't have too much or too little federal income tax withheld.					
	O -	Distant Experient	Adjustments	(Inheliana	Tax Credits	- O	
About You	on that best describes	how you anticipate filing	una XIII tia mtar				
1 of 5: Filling St							
What King status w	ill you use for your to	material Completes					
■ Single							
C Married Sting (s)	ntty						
C Married King sy	paratirly .						
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IRS.gov – Keyword:

Withholding Calculator

# Advisory Groups



Help | News | Languag

File

Pay

Refunds

**Credits & Deductions** 

Forms & Instructions

Home > News > News Releases > IRSAC expands to cover more areas of the IRS; IRPAC and ACT to join centralized advisory committee in 2019

IRSAC expands to cover more areas of the IRS; IRPAC and ACT to join centralized advisory committee in 2019



English

nal Revenue Service announced today that the Internal Revenue Service Advisory Council's role will expand in 2019 to have a orate two other advisory groups.

nclude areas currently covered by both the Information Reporting Program Advisory Committee (IRPAC) and the Advisory

### IRSAC and ETAAC



# Security Summit Group

Joint effort to combat tax-related identity theft

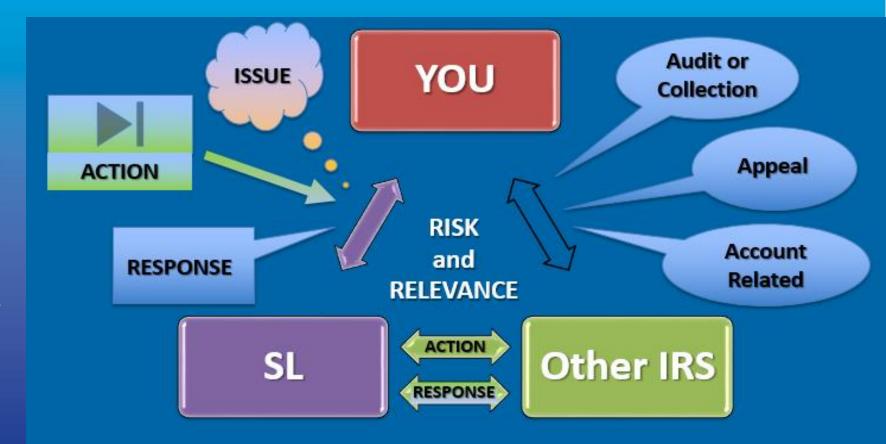


### Between 2015 – 2018:

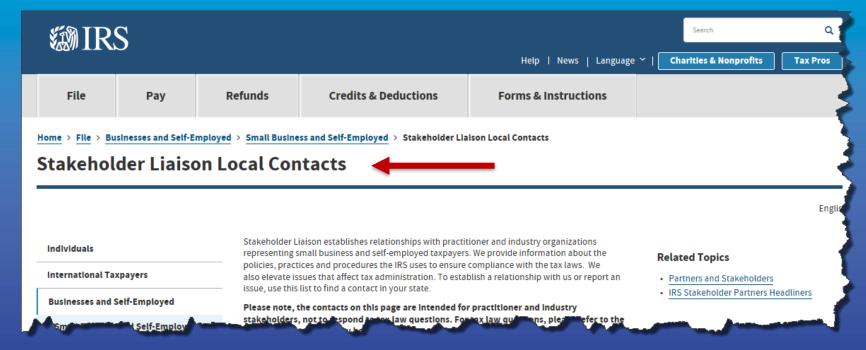
- Taxpayers reporting as identity theft victims \$\frac{1}{71}\%
- Identity theft returns stopped by the IRS 54%
- IRS protected a combined \$24 billion in fraudulent refunds
- Financial industry partners recovered an additional \$1.4 billion in fraudulent refunds

IRS.gov – Keyword: security summit

## Issue, Action & Response



# Contact Us Stakeholder Liaison Local Contacts



IRS.gov – Keyword: stakeholder liaison

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# In Summary

- View & share IRS Communications timely
- Attend IRS Training & Meetings
- Be informed about other significant programs & resources
- Interact for answers & guidance; provide feedback & ideas
- Report systemic issues & concerns



## Start Here – Start Now!





